

9

PORTUGAL:

EUROPEAN DIRECTIVE “AUDIOVISUAL MEDIA SERVICES”: THE BEGINNING OF THE END FOR TELENOVELA MONISM?¹*DOI: <https://doi.org/10.7764/obitel.21.E.11>***Authors:***Catarina Duff Burnay (<https://orcid.org/0000-0001-7730-1707>)**Pedro Lopes (<https://orcid.org/0000-0002-9283-6117>)**Marta Neves de Sousa (<https://orcid.org/0000-0002-8358-3189>)**João Félix (<https://orcid.org/0000-0002-3433-2877>)**Ana Lúcia Carvalho (<https://orcid.org/0000-0002-3942-6688>)***Introduction**

This year was unequivocally marked by the SARS-CoV-2 pandemic and, consequently, by the way in which lockdowns precipitated a trend in the Portuguese media consumption that had already become clear: the adoption of streaming services and a significant increase in the time devoted to entertainment and content not found on traditional free-to-air (FTA) broadcasters. And, while these video on demand services have become commonplace among younger, urban and educated view-

1 The Portuguese team would like to thank CAEM, GfK and Markttest-MediaMonitor for its cooperation in gathering and processing the necessary data.

ers, the changes in social practices during 2020 widened their reach to other audiences searching for their offering, especially fiction. This was evidenced by the increase in fanbase for many titles, earning them the status of culturally relevant objects. At the same time, with the enactment of the European Directive “Audiovisual Media Services” into national law, the way seems to be paved for the increased demand in media content by other platforms and, consequently, for the production of alternative formats to the telenovela on a larger scale, thus contributing to a more varied marketplace closely following the trend shown by Portuguese audiences.

1. The Audiovisual Context of Portugal in 2020

1.1 Broadcast television in Portugal

Chart 1. National TV Networks/broadcast television channels in Portugal

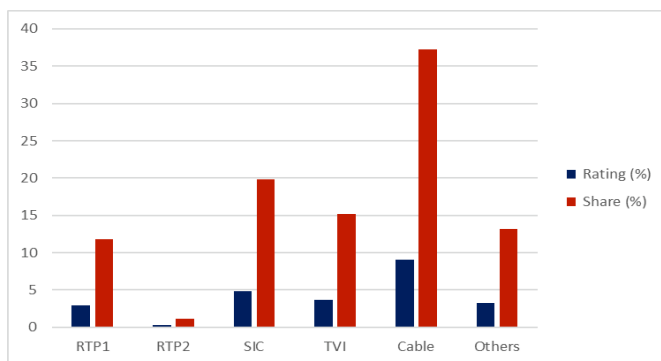
Private networks/channels (2)	Public networks/channels (4+1)
SIC	RTP1
TVI	RTP2
	RTP3
	RTP Memória
	Canal Parlamento
TOTAL NETWORKS =3	
TOTAL CHANNELS = 7	

Source: Obitel Portugal

Graph 1. Rating and share by TV station (generalist)

Channel	Rating (%)	Share (%)
RTP1	2,9	11,8
RTP2	0,3	1,1
SIC	4,8	19,8
TVI	3,7	15,2
Cable	9	37,2
Others	3,2	13,2
TOTAL		

Source: *Obitel Portugal / Markttest MediaMonitor*



While television consumption increased 22%² from 2019 into the first semester of 2020, the numbers began to decline by Summer. Still, the year ended with an 18%³ increase in viewership, mostly in the

2 Meios e Publicidade. Retrieved on April 29, 2021 <https://www.meiosepublicidade.pt/2020/07/audiencias-tv-consumo-cresceu-22-no-primeiro-semester-ja-recuou-8-junho/>

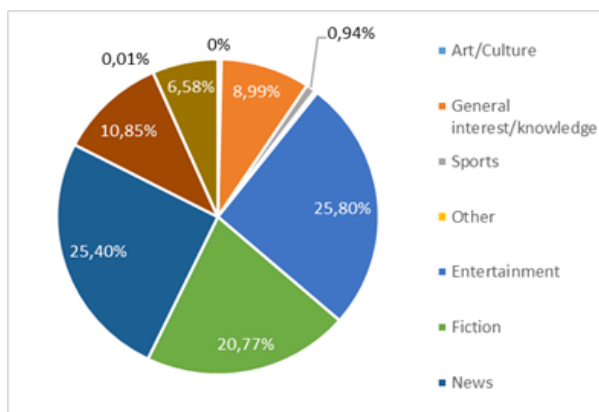
3 Meios e Publicidade. Retrieved on April 29, 2021 <https://www.meiosepublicidade.pt/2021/01/audiencias-tv-2020-consumo-cresce-18-ano-pandemia-share-da-sic-sobe-rtv1-descem-face-2019/>

“others” category - alternative screen usage and streaming. Regarding the latter, there were an estimated 800.000 new subscriptions of entertainment services between February and April, 2020⁴, namely Netflix and HBO Portugal. Inversely, the subscription-based television channels saw their viewership decline. The private broadcaster SIC, which leads the charts since 2019, was the only network to show a slight increase from the previous year (+0,6%) while TVI and the public channels saw lower numbers from 2019.

Graph 2: TV genres and broadcast programming hours - % (Generalist channels)

Genres broadcasts	Hours of broadcasting	%
Art/Culture	108:34:44	0,35%
General interest/knowledge	2772:20:42	8,99%
Sports	291:50:35	0,94%
Other	98:41:28	0,31%
Entertainment	7956:08:01	25,80%
Fiction	6405:38:59	20,77%
News	7834:35:28	25,40%
Young audiences	3344:15:29	10,85%
Others	2:25:21	0,01%
Advertisement	2026:30:24	6,58%
Total	30841:01:11	100%

4 Marktest. Retrieved on April 20, 2021. <https://www.marktest.com/wap/a/n/id-262d.aspx>



Source: Obitel Portugal / Marktest MediaMonitor

The effects of the pandemic caused by the SARS-CoV-2 virus, namely the lockdown periods, led to an increase in the demand for media content while impacting productivity. Therefore, in 2020 there was an increase in the total number of hours broadcast by free to air generalist channels, particularly due to the added offering of news (+12% and entertainment (+10%) programmes. Due to directing/production requirements and their specificity, the e-sports and fiction genres were the most affected, with the former showing nearly a 60% drop from the previous year and a 4,2% drop for the latter. In terms of advertisement, even though there was a decrease in investment, the free-to-air generalist channels increased their total number of advertisement hours by nearly 4% from 2019.

1.2. Paid TV and VoD Platforms in Portugal

According to the data, and going against the trend in previous years, the offering by paid channels saw a share decrease of 5,5% from 2019, which represents 37,2% of the total audience share in 2020. Among these, the channel CMTV maintained its lead with 4,2%, followed by Globo and SIC Notícias, with a share of 2,3% and 2,2% respectively. This decrease is connected to the increase in viewership of non-audited channels and the use of television for other services such as streaming and console gaming, which registered a share of 13,2%, growing 1,4% from the previous year. According to data provided by the National Communications Authority (ANACOM), the number of television subscriptions in 2020 grew 4% from the previous year.

As for providers of this type of service in Portugal, MEO took over the lead from NOS, its direct competitor and the leader in previous years (40% vs. 39%). Providers VODAFONE and NOWO remain in third and fourth place with 17,3% and 3,9% of all subscribers respectively.

Regarding fibre, it grew 4,9% from 2019 and remained as the technology with the largest number of subscribers, now representing over 50% (51,6%) of all clients of subscription-based television offering.

Chart 2. Pay TV networks in Portugal

Outstanding Pay TV networks in 2020
1) CMTV (Generalist), 2) Globo (Generalist), 3) SIC Notícias (News), 4) Hollywood (Fiction), 5) FOX (Fiction), 6) TVI 24 (News), 7) Disney Channel (Children), 8) Cartoon Network (Children), 9) FOX Movies Portugal (Fiction), 10) FOX Life (Fiction))
TOTAL: 10 news networks

Table 2 shows the TOP 10 of paid television channels, dominated by fiction channels (4) and an equal offering (2) of generalist, news and children’s channels. Throughout 2020, none of these channels premièred national fiction.

Chart 3. VoD in Portugal

Top 10 VoD platforms active in 2020	Total
Netflix, Prime Video (Amazon), Disney+ (The Walt Disney Company), HBO Portugal (WarnerMedia), Apple TV+ (Apple), RTP Play (RTP), TVI Player (TVI), OPTO (SIC), Mubi, Filmin, NOS Play	10
TOTAL	10

Source: Obitel Portugal

Table 3 shows the main VoD platforms in Portugal, not including official Youtube channels from any type of broadcaster. According to the European Audiovisual Observatory (EAO)⁵, six of the presented platforms have the largest presence across the 28 countries in the European Union - Netflix, Prime Video, Disney +, HBO, Apple TV+ and Mubi - the remaining platforms being associated to national open signal television channels (RTP Play, TVI Player and OPTO). Of the aforementioned platforms, only two offer a free subscription service - RTP Play and TVI Player, the latter being paid for international users - and the remaining 9 are paid subscription services.

5 European Audiovisual Observatory Retrieved on April 12, 2021 <https://rm.coe.int/trends-in-the-vod-market-in-eu28-final-version/1680a1511a>

1.3. Independent television fiction production companies

The independent production market is small due to the number of TV stations airing national fiction. Only recently, with the development of a co-production system that pre-empted the European directive, has it been possible to gain some visibility beyond borders in the series format. The discussion of the European Directive “Audiovisual Media Services” in Brussels and its subsequent enactment into national law has led subscription channels and streaming platforms alike to react on it. However, on a year marked by the pandemic, several productions had to be delayed.

The sphere in which these independent production companies operate is composed by multinational ventures and small and medium-sized local producers, all acting in accordance to their specialized production segments. Having no significant attachment to television channels, independent producers focusing on fiction are required to sign contract orders where they give away their intellectual property rights to broadcasters. An exception to this are works supported by the Instituto do Cinema e do Audiovisual (ICA).

This public institution financially backs independent producers in three stages: writing and development, demonstration support and production. In the latter, producers are required to have already established a contract with a national broadcaster committing to air and finance the project, even if in a minority stake. Therefore, for projects to be developed, production companies find themselves dependant on a client and its own interest right from the start.

1.4. Sources of funding for the audiovisual sector

The support by Instituto do Cinema e do Audiovisual (ICA) identified above has been granted to audiovisual and media

production since 2014. Up until that year, only cinema was eligible to benefit from government support. Even so, the distribution remains uneven (apart from other financing, 20% of the financing overall is afforded to audiovisual and 80% to cinema). The new television law (*Lei da Televisão e dos Serviços Audiovisuais a Pedido*, Lei 74/2020) bolsters these supports by requiring streaming platforms to pay a tax corresponding to 1% of their relevant profits, which is to be afforded by ICA through annual tenders, as well as the requirement that streaming platforms invest 4 million Euro in Portuguese-speaking productions. Still under the institutional scope, the MEDIA (Europa Criativa) stands out as a programme supporting the cultural and creative sector in the European Union and the IBERMEDIA is an incentive programme for the development of feature films and fiction in the Iberian-American space. There is also the legal requirement for the public network RTP to invest directly in independent cinema and media production on an annual basis through tenders and, consequently, to the production and broadcast of nationally produced series and mini-series. Soft sponsoring/product placement is another source of income which has been identified in recent years as a growing resource for broadcasters, whether in entertainment programmes or in fiction. For the past five years, the brands’ return on investment increased from 471 million Euro to 862,9 million Euro⁶. Apart from financially contributing towards production, this practice mitigates viewership behaviour patterns such as zapping during ad breaks. In 2020 this strategy had no significant impact over investment in fiction, since there was no increase either in production hours or in prices.

6 Meios e Publicidade. Retrieved on April 18, 2021 <https://www.meiosepublicidade.pt/2020/02/os-canais-programas-captam-investimento-soft-sponsoring-portugal/>

1.5. Communication Policies

2020 was marked by the enactment into national law of the European Directive “Audiovisual Media Services”. The directive, which was approved in 2018 by the European Parliament and the European Council, was passed into national law in October 2020 and approved by the Portuguese President in November. It aims to regulate the audiovisual media service offering among Member States, including subscription channels, video sharing platforms and Video on Demand services. Up until now, these content production and distributing entities not based in Portugal weren’t required to contribute nor to the development or the distribution of European and national works. Even though the transition process stirred some controversy among television and audiovisual professionals due to differing interpretations on the conditions, an agreement was reached on the terms, notably the following⁷: i) 1% tax payment of relevant revenue by on demand subscription-based audiovisual service operators and video sharing platforms; ii) Minimum quota of 30% of European works offered by on demand audiovisual services, ensuring a significant presence of these works in their catalogue and devoting at least half of this percentage to original Portuguese-speaking independent European creative works produced in the last five years. iii) investment requirement in cinema and audiovisual, as was already stipulated for television broadcasters.

It was also in 2020 that there was an European Parliament resolution on strengthening media freedom with the purpose of protecting journalists, dealing with hate speech, misinformation and the role of platforms in these. This was due to a technologized media eco-chamber that has led to the instalment of an infodemic environment with the increased spread of misinformation, a plight that has been ad-

7 Diário da República Eletrónico-Lei 74/2020. Retrieved on April 18, 2021 <https://dre.pt/home/-/dre/148963298/details/maximized>

dressed by the World Health Organization itself. Lastly, and following the impact of the Sars-Cov-2 pandemic, emphasis should be given to the governmental support of 15 million Euro to financial sectors and the media through a programme of pre-emptive acquisition of institutional advertisement, along with other lines of credit and support. The media public service also announced a support package for independent producers by foreseeing an added investment in audiovisual products and anticipating a content consultation (direct project reception).

1.6. Digital and mobile connectivity infrastructure

The Digital Economy and Society Index (DESI)⁸, published in June, 2020 by the European Union places Portugal in 19th place among the 28 Member States, particularly due to the uneven broadband coverage between rural and urban areas, the fact that 22% of the Portuguese population has never had internet access and the fact that the tech sector represents less than 3% of the Portuguese economy. This report, however, states that over 80% of the public administration services are available online and over 50% of families have internet access. Due to the impact of the Covid-19 pandemic in the digital transformation and considering how it may be vital for the economic and social recovery of the Member States after the pandemic, the resolution titled “Shaping Europe’s Digital Future” gained a new momentum and impact by identifying digital development as a crucial element in society.

According to Marktest’s Bareme 2020⁹, internet access by people over 15 years old only slightly increased from 2019 (+1%), mobile phones being the leading platform in terms of access growth across all demographics. On the other hand, the use of tablets stalled, with even a decreased use by the younger demographic.

8 Digital Economy and Society Index (DESI). Retrieved on April 18, 2021 <https://ec.europa.eu/digital-single-market/en/digital-economy-and-society-index-desi>

9 Bareme 2020. Retrieved on April 22, 2021 <https://www.marktest.com/wap/a/n/id~269e.aspx>

Lastly, and in line with the recovery measurements post-Covid-19, emphasis should be given to mobile 5G, a seemingly revolutionary technology which supports 1000 times the traffic of existing networks and a speed 10 to 20 times faster than 4G. Apart from these advancements, there are others impacting security, public health (e.g. remote monitoring) as well as applications in autonomous vehicles, smart cities or precision agriculture. As in other countries, the deadlock between the regulating body (ANACOM) and providers has contributed to the delay in implementing this technology. At the moment, the bidding for the attribution frequency usage rights are underway.

2. Analysis of the Year: National and Ibero-American Premiere Fiction on broadcast television

Table 1. Fiction aired in 2020 (national and imported; premiere, reprises and co-productions)

PREMIERE NATIONAL TITLES – 19

RTP1 – 5

1. *A Espia* (series)
2. *A Herdade* (mini-series)
3. *Crónica dos Bons Malandros* (series)
4. *O Atentado* (series)
5. *O Mundo não Acaba Assim* (series)

RTP2- 2

6. *A Rede* (series)
7. *Quarenteens* (series)

SIC – 7

8. *Esperança* (one-shot)
9. *Golpe de Sorte: a história da Maria do Céu* (tv film)
10. *Golpe de Sorte IV* (series)
11. *Nazaré* (telenovela)
12. *Nazaré: especial Natal* (mini-series)
13. *Patrões Fora* (sitcom)
14. *Terra Brava* (telenovela)

TVI – 5

15. *Ai a Minha Vida* (sitcom)
16. *Amar Demais* (telenovela)
17. *Bem me Quer* (telenovela)
18. *Na Corda Bamba* (telenovela)
19. *Quer o Destino* (telenovela)

PREMIERE IMPORTED TITLES – 4

SIC – 4

1. *A Dona do Pedaço* (telenovela)
2. *Amor de Mãe* (telenovela)
3. *Eta Mundo Bom!* (telenovela)
4. *Totalmente Demais* (telenovela)

RERUN TITLES – 63

RTP1 – 12

1. *3 Mulheres* (series)
2. *Bem-Vindos a Beirais* (long-running series)
3. *Conta-me como Foi* (series)
4. *Idiotas, ponto.* (series)
5. *Lua Vermelha* (series)
6. *Miúdo Graúdo* (series)
7. *O Nosso Cônsul em Havana* (series)
8. *O Sábio* (series)
9. *Solteira e Boa Rapariga* (series)
10. *Terra Nova* (series)
11. *Verão M* (series)
12. *Voo Directo* (series)

RTP2 – 6

13. *A Criação* (series)
14. *Aqui Tão Longe* (series)
15. *Lusitana Paixão* (telenovela)
16. *Os Nossos Dias* (soap opera)
17. *Sara* (series)
18. *Sinais de Vida* (series)

SIC – 21

19. *Amor à Vida* (telenovela-Brasil)
20. *Viver a Vida* (telenovela-Brasil)
21. *ONICE* (YA series)
22. *A hora da Liberdade* (tv film)
23. *Alta Fidelidade* (tv film)
24. *Amo-te Teresa* (tv film)
25. *Aniversário* (tv film)
26. *Anjo Caído* (tv film)

27. *Até Amanhã Camaradas* (tv film)
28. *Capitão Roby* (series)
29. *Camilo, o Presidente* (sitcom)
30. *Facas e Anjos* (tv film)
31. *Golpe de Sorte - um Conto de Natal* (tv film)
32. *Jogo da Glória* (tv film)
33. *Monsanto* (tv film)
34. *O Crime do Padre Amaro* (mini-series)
35. *O Espírito da Lei* (series)
36. *O Segredo* (series)
37. *Rainha das Flores* (telenovela)
38. *Um Passeio no Parque* (series)
39. *Uma Aventura* (YA series)

TVI – 24

40. *Maria Madalena* (series-Mexico)
41. *A Casa é Minha* (sitcom)
42. *A Outra* (telenovela)
43. *Belmonte* (telenovela)
44. *Campeões e Detetives*
45. *Casos da Vida* (one-shot)
46. *Destinos Cruzados* (telenovela)
47. *Detective Maravilhas* (YA series)
48. *Doce Tentação* (telenovela)
49. *Espírito Indomável - a série* (series)
50. *Filmes TVI* (tv film)
51. *Inspector Max* (series)
52. *Louco Amor* (telenovela)
53. *Mar de Paixão* (telenovela)
54. *Morangos com Açúcar VII: vive o teu Verão* (YA series)
55. *Morangos com Açúcar VIII: vive o teu Verão* (YA series)
56. *Mundo ao Contrário* (telenovela)
57. *O Amor É um Sonho* (Telenovela)
58. *O Bando dos 4* (YA series)
59. *Onde está Elisa?* (series)
60. *Ministério do Tempo* (series)
61. *Prisioneira II* (telenovela)
62. *Saber Amar* (telenovela)
63. *Santa Bárbara - a série* (series)

TOTAL PREMIERE NATIONAL TITLES: 19

TOTAL RERUN TITLES: 63

TOTAL AIRED TITLES: 81

In 2020 Portugal’s offer of original titles reverted to the same numbers as those in 2018 (19). Private channels offered the same number of titles as in 2019 while RTP1 broke the trend and presented three fewer titles than in 2019. The second public media service channel RTP2, which had not premièred any titles in 2019, is now present in the chart with two series. On the other hand, the subscription-based channel CMTV, which made an attempt by airing a national telenovela in 2019, discontinued this strategy due to a lack of ratings. If the number of rerunning titles had already increased from 2018 to 2019, this trend continued through 2020, mostly due to the need to reduce programming costs. Out of the four channels in the analysis, SIC was the one which presented the largest increase, with 61% more titles in rerun than in 2019. Even though it had the same number of premières (7), only two were telenovelas coming from 2019. This led to the need to fill the slots.

Regarding products imported from the Iberian-American space, there was an increase (from three to four titles) of telenovelas which were aired by SIC during primetime/late night.

Table 2. Fiction premiere in 2020: Countries of Origin

Country	Titles	%	Chapters/ Episodes	%	Horas	%
NATIONAL (total)	19	82.6	1242	76.6	794:19:21	75.8
OBITEL COUNTRIES total)	4	17.4	380	23.4	252:59:13	24.2
Argentina	0	0.0	0	0.0	0:00:00	0.0
Brasil	4	17.4	380	23.4	252:59:13	24.2
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	0	0.0	0	0.0	0:00:00	0.0
Equador	0	0.0	0	0.0	0:00:00	0.0
Espanha	0	0.0	0	0.0	0:00:00	0.0
EUA (produção hispânica)	0	0.0	0	0.0	0:00:00	0.0
México	0	0.0	0	0.0	0:00:00	0.0
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	19	82.6	1246	76.8	794:56:33	75.9
Uruguay	0	0.0	0	0.0	0:00:00	0.0
Venezuela	0	0.0	0	0.0	0:00:00	0.0
COPRODUÇÕES (total)	0	0.0	0	0.0	0:00:00	0.0
Coproduções brasileiras	0	0.0	0	0.0	0:00:00	0.0
Coproduções entre países	0	0.0	0	0.0	0:00:00	0.0
Obitel	0	0.0	0	0.0	0:00:00	0.0
GRAN TOTAL	23	100.0	1622	100.0	1047:18:34	100.0

The drop in opening national titles had an impact in the number of chapter/episodes (-42%) and in the volume of aired hours (-22.5%). However, the imported titles, all coming from Brazil, managed to surpass the additions from 2019 (+18%) and, consequently, the total number of hours (+21%).

Table 3. National and Ibero-American fiction formats

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	6	31.6	1074	86.5	709:10:56	89.3	4	100.0	380	100.0	252:59:13	1.0
Série	6	31.6	145	11.7	68:39:10	8.6	0	0.0	0	0.0	0:00:00	0.0
Minissérie	3	15.8	12	1.0	8:23:39	1.1	0	0.0	0	0.0	0:00:00	0.0
Telefilme	1	5.3	1	0.1	1:37:39	0.2	0	0.0	0	0.0	0:00:00	0.0
Unitário	1	5.3	1	0.1	0:57:24	0.1	0	0.0	0	0.0	0:00:00	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Sitcom	2	10.5	9	0.7	5:30:33	0.7	0	0.0	0	0.0	0:00:00	0.0
Total	19	100.0	1242	100.0	794:19:21	100.0	4	100.0	380	100.0	252:59:13	1.0

Source: Obitel Portugal / Marktest MediaMonitor

In 2020 there was a greater variety of formats than in 2019, with a reduction in the number of telenovelas (from 10 to 6) as well as series (from 8 to 7) and tv films (from 2 to 1), but an increase of mini-series (from 1 to 3). Regarding series, it is important to point out the integration of two structural trends - on the one hand the series with seasons and, on the other, the limited series, conceived with a single and closed narrative arc (*Crónicas dos Bons Malandros*, RTP). Considering the pandemic context, it is equally interesting to see that there were two series on this very subject aired by the public network: *O Mundo não Acaba Assim* - multiple concurrent stories told through webcams and produced in the actors' own homes and *Quarenteen*, a piece of content geared towards the YA audience.

There were also notable examples in the sitcom and one-shot format. The latter, not having too much of a tradition in Portugal, was used by SIC to premiere *Esperança*, one of their "star" titles

available on their new streaming platform - OPTO. Audiences had then the chance to watch the pilot in open signal which would spark their interest in subscribing. At the same time, the private channel followed up on the strategy of building parallel stories to successful titles under new formats, thus contributing to a renewed offering while taking advantage of production structures that were already in place and adapted to the pandemic constraints (the TV film *Golpe de Sorte: a história da Maria do Céu* and the mini-series *Nazaré: especial Natal*). Equally noteworthy was the return of the sitcom, which, despite its long-standing history in Portugal, has had a diminished expression in recent years. *Patrões Fora* (SIC) plays out on the set of the daytime talk show *Casa Feliz* in a sort of plot/genre crossover (fiction and entertainment), thus attempting to engage a broader audience. *Ai a Minha Vida* (TVI) is a carbon copy of the famous Brazilian sitcom *Sai de Baixo*, but, due to the Covid-19 pandemic, had to forego the live airing and studio audience.

Table 4. The ten most watched titles on broadcast television

	Titles	Channel	Production company	Format/ Genre	Nº of ch./ep. (2020)	Time Slot	Rating	Share
1	<i>Nazaré</i>	SIC	SP Televisão	Telenovela/ Drameia	250	Primetime	14.6	27.1
2	<i>Terra Brava</i>	SIC	SP Televisão	Telenovela /Melodrama	266	Primetime	12.7	27.6
3	<i>Patrões Fora</i>	SIC	Coral Europa	Sitcom/ Comedy	3	Primetime	12.2	22.5
4	<i>Quer o Destino</i>	TVI	Plural Entertainment	Telenovela /Melodrama	229	Primetime	11.5	21.9
5	<i>Bem Me Quer</i>	TVI	Plural Entertainment	Telenovela /Melodrama	58	Primetime	11.1	21.3
6	<i>Amar Demais</i>	TVI	Plural Entertainment	Telenovela /Melodrama	89	Primetime	9.2	20.9

Titles		Channel	Production company	Format/Genre	N° of ch./ep. (2020)	Time Slot	Rating	Share
6	<i>Amar Demais</i>	TVI	Plural Entertainment	Telenovela /Melodrama	89	Primetime	9.2	20.9
7	<i>Eta Mundo Bom</i>	SIC	TV Globo	Telenovela /Melodrama	106	Access	8.6	20.4
8	<i>Golpe de Sorte IV</i>	SIC	Coral Europa	Series/ Dramey	81	Primetime	7.6	21.3
9	<i>Na Corda Bamba</i>	TVI	Plural Entertainment	Telenovela /Melodrama	148	Primetime	7.5	16.2
10	<i>Crónica dos Bons Malandros</i>	RTP	Ukbar Filmes and Moonshot Pictures	Mini-series/ Comedy	4	Primetime	6.0	10.9

Source: *Obitel Portugal / Marktest MediaMonitor*

In 2020 SIC kept its lead in audience fiction preference and reached not only the top three spots, but a total of five products among the most viewed shows by Portuguese audiences, with the telenovela *Nazaré* being the most watched in Portugal in 2020. TVI closely follows with four titles, the same number as in 2019.

Inversely to what happened in the previous year, in 2020 the Brazilian telenovela *Eta Mundo Bom* managed to reach the top ten titles, showing that Portuguese audiences still watch non-national fiction content and, in this case, on time slots other than primetime, which is when most of this format is aired. The public network hadn't managed to offer a title in the top ten in 2019, but last year, the mini-series *Crónica dos Bons Malandros*, an adaptation of a literary work from the 1980s about the adventures of a legendary crew of robbers who pulled

a famous heist in the post-revolution period in Portugal, managed to reach the last place in the chart.

As far as formats, even though the telenovela remains as the preferred one (with 7 titles), there is a larger variety with the offering of a mini-series and a sitcom. Regarding genres, emphasis should be given to dramedy, a term often used by the industry to define a hybrid genre that combines drama and comedy without trying to repeat the usual genres present in the traditional vaudeville format, as present in the comic relief characters within the melodrama, attempting instead to merge the two. Dramedy has created its own identity as a genre by blending dissonant elements and by being able to create a new order of meaning, thus earning itself a new labelling concept.

Table 5. Audience profile of the ten most viewed titles: gender, age, socioeconomic status

Titles		Channel	Genre %		Socioeconomic status %				
			Women	Men	A	B	C	D	E
1	<i>Nazaré</i>	SIC	61.4	38.6	1.8	9.8	15.6	42.8	29.9
2	<i>Terra Brava</i>	SIC	62.2	37.8	1.5	9.5	16.0	42.7	30.3
3	<i>Patrões Fora</i>	SIC	59.7	40.3	2.5	14.2	16.1	40.2	26.9
4	<i>Quer o Destino</i>	TVI	61.6	38.4	3.7	5.4	13.8	44.5	32.7
5	<i>Bem Me Quer</i>	TVI	61.5	38.5	2.0	6.6	13.2	42.8	35.5
6	<i>Amar Demais</i>	TVI	61.2	38.8	2.1	5.7	13.5	41.7	36.9
7	<i>Eta Mundo Bom</i>	SIC	64.9	35.1	2.4	9.5	13.1	43.5	31.5
8	<i>Golpe de Sorte IV</i>	SIC	63.2	36.8	1.3	9.7	17.6	44.3	27.1
9	<i>Na Corda Bamba</i>	TVI	62.1	37.9	1.8	4.3	14.6	45.4	33.9
10	<i>Crónica dos Bons Malandros</i>	RTP	54.3	45.7	2.4	14.7	17.5	41.5	23.8

Source: Obitel Portugal / Marktest MediaMonitor

Titles		Channel	Age groups %							
			4 to 14	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75+
1	<i>Nazaré</i>	SIC	6.1	7.9	7.8	10.9	15.9	20.3	17.4	13.7
2	<i>Terra Brava</i>	SIC	5.1	6.9	6.8	10.5	15.7	21.8	17.8	15.5
3	<i>Patrões Fora</i>	SIC	6.2	7.3	6.3	12.7	15.0	21.0	17.7	13.7
4	<i>Quer o Destino</i>	TVI	5.0	6.5	10.5	10.1	11.9	19.6	17.6	18.8
5	<i>Bem Me Quer</i>	TVI	5.2	7.9	9.5	8.8	12.1	19.8	19.8	16.9
6	<i>Amar Demais</i>	TVI	4.1	6.4	9.5	8.8	11.7	22.8	19.4	17.4
7	<i>Eta Mundo Bom</i>	SIC	4.6	7.6	5.8	9.7	17.0	24.0	16.1	15.2
8	<i>Golpe de Sorte IV</i>	SIC	4.8	6.7	7.7	13.8	15.1	22.1	15.6	14.3
9	<i>Na Corda Bamba</i>	TVI	5.0	6.1	8.9	10.9	12.0	20.0	19.5	17.5
10	<i>Crónica dos Bons Malandros</i>	RTP	1.9	3.6	4.8	6.7	9.9	18.2	22.6	32.3

Source: *Obitel Portugal / Marktest MediaMonitor*

Telenovela remains as the preferred format for women, as evidenced by the data on every title, while men maintain a relatively stable preference across the content present in the top ten (38%). It is worth noting that the only major difference can be seen in the percentage of men who watched the mini-series *Crónica dos Bons Malandros* on RTP, which was the title where male audiences came the closest their female counterparts (less 8,6% than women's 54,3% lead).

Regarding socio-economic brackets, groups D and E still prefer the *telenovela* as their primetime program of choice. Following the trend of the previous year, the differences between socio-economic brackets preferring SIC and TVI disappeared altogether, as the telenovela which managed to capture a larger section of viewers in the A bracket was TVI's *Quer o Destino*.

By looking at the results pertaining to age groups, the telenovela format remains as the preferred across the board or, in other words, families. The best results are still those from the 55+ age group. *Patrões Fora* (SIC) was the only title that won more audience among a younger age group and *Crónica dos Bons Malandros* (RTP) was the production that most attracted older audiences.

3. VoD Monitoring in 2020

In a year marked by the Covid-19 pandemic, the new consumption profiles for fiction still hold as a growing trend and the streaming offer is ever more extensive. This trend can be seen on a global scale, according to the data collected by Marktest’s Barómetro de Telecomunicações¹⁰, with Netflix registering over 15 million new subscribers between February and April. In Portugal, this service had over 800 thousand new subscribers during the same period.

In Portugal, 2020 was also a landmark year for the launch of two streaming platforms: Disney+ and OPTO (SIC’s streaming platform), both included in Table 3. Along with OPTO, RTP Play is also worth mentioning as these two platforms were the only ones with premiering national titles in 2020.

3.1. VoD Market Platforms

According to the European Audiovisual Observatory (EAO) mentioned in 1.2, by 2020 Portugal had 14 SVoD services, with around 1.6 million subscribers (roughly 10% of the Portuguese population). At its lead, Netflix remains as the most relevant platform with 47% of all subscribers, followed by Apple TV+ (21%) and Prime Video (13%). The growing number of Apple TV+ subscribers against the previous year is partly due to the fact that this service was on offer with the purchase of an Apple device.

The aforementioned impact also translated into a larger number of revenue in the provider market, as mentioned by Obercom’s report “Impacto do Coronavirus e da crise pandémica no Sistema

¹⁰ Marktest Portugal. Retrieved on April 10, 2021 <https://www.marktest.com/wap/a/n/id~262d.aspx>

mediático português e global”¹¹. According to the report, Vodafone had an 8% increase in revenue from previous years.

Data published by the platform Statista¹², indicate that VoD service revenue reached 52,6 million Euro in 2020, and it is estimated that in 2021 it will reach 62 million Euro, which represents a 15,1% from the previous year. According to this data, a gradual increase of revenue (5.8%) is to be expected, with a projected 78 million Euro in 2025.

3.2. Analysis of VoD in 2020: national and Ibero-American premiere fiction

In 2020 there was a reduction in the number of Iberian-American titles on offer due to the global Covid-19 pandemic, which had an impact on numerous audiovisual productions across the world. In Portugal, the VoD platforms presented a total of 36 premiering productions, four of which were co-productions. These numbers, as shown on Chart 6, strengthen Netflix’s dominance as the OTT with the largest offering, with 18 premiering titles, followed by HBO Portugal (9), Prime Video (4), OPTO (3) and RTP Play /2). Regarding Portuguese titles, there was an offering of five national productions and one co-production with Spain (the series *Auga Seca*), with particular emphasis given to OPTO, which presented itself as a new VoD player, as discussed in 6.

11 Obercom. Retrieved on April 10, 2021 https://obercom.pt/wp-content/uploads/2021/02/Covid_III_FINAL.pdf

12 Statista. Retrieved on April 10, 2021 <https://www.statista.com/outlook/dmo/digital-media/video-on-demand/video-streaming-svod/portugal>

Table 6. National and Ibero-American fictions in 2020 on VoD systems

NATIONAL PREMIERE TITLES	IBERO-AMERICAN PREMIERE TITLES	CO-PRODUCTIONS
<p>RTP Play – 2</p> <ol style="list-style-type: none"> 1. <i>Dolores (series)</i> 2. <i>Instaverso (series)</i> <p>OPTO – 3</p> <ol style="list-style-type: none"> 1. <i>A Generala (series)</i> 2. <i>Esperança (series)</i> 3. <i>O Clube (series)</i> 	<p>Prime Vídeo – 3</p> <ol style="list-style-type: none"> 1. <i>Caronte (series - Spain)</i> 2. <i>El Cid (mini-series - Spain)</i> 3. <i>Como Sobrevivir Soltero (series - Mexico)</i> <p>HBO Portugal – 8</p> <ol style="list-style-type: none"> 1. <i>El Embarcadero (series - Spain)</i> 2. <i>El Ministerio del Tiempo (series - Spain)</i> 3. <i>En Casa (anthology - Spain)</i> 4. <i>Escenario 0 (series - Spain)</i> 5. <i>Patria (series - Spain)</i> 6. <i>Por H o por B (series - Spain)</i> 7. <i>Veneno (mini-series - Spain)</i> 8. <i>30 Monedas (series - Spain)</i> <p>Netflix – 16</p> <ol style="list-style-type: none"> 1. <i>3% (series- Brazil)</i> 2. <i>A Coisa Mais Linda (series - Brazil)</i> 3. <i>Alta Mar (series - Spain)</i> 4. <i>Boca a Boca (series – Brazil)</i> 5. <i>Casi Feliz (series – Argentina)</i> 6. <i>El Desorden que Dejas (series – Spain)</i> 7. <i>El Robo del Siglo (series – Colombia)</i> 8. <i>Elite (series– Spain)</i> 9. <i>La Casa de las Flores (series – Mexico)</i> 10. <i>La Casa de Papel (series – Spain)</i> 11. <i>Las Chicas del Cable (series – Spain)</i> 12. <i>Los Favoritos de Midas (mini-series – Spain)</i> 13. <i>O Sabor das Margaridas (mini-series – Spain)</i> 14. <i>Puerta 7 (series – Argentina)</i> 15. <i>Valeria (series – Spain)</i> 16. <i>Vivir Sin Permiso (series – Spain)</i> 	<p>Prime Vídeo – 1</p> <ol style="list-style-type: none"> 1. <i>El Presidente (series – Argentina, Chile, EUA)</i> <p>HBO Portugal – 1</p> <ol style="list-style-type: none"> 1. <i>Auga Seca (series – Spain, Portugal)</i> <p>Netflix – 2</p> <ol style="list-style-type: none"> 1. <i>Alguien Tiene que Morir (mini-series – Spain, Mexico)</i> 2. <i>Selena: la serie (series – Mexico, EUA)</i>
<p>Total: 5</p>	<p>Total: 27</p>	<p>Total: 4</p>
<p>GRAND TOTAL: 36</p>		

Table 7. Fiction premiere in 2020 on VoD: countries of origin

Country	Titles	%
NATIONAL (total)	5	13.8
OBITEL COUNTRIES (total)	27	75.1
Argentina	2	5.6
Brazil	3	8.4
Chile	0	0.0
Colombia	1	2.7
Ecuador	0	0.0
Spain	19	52.8
USA (Latin production)	0	0.0
Mexico	2	5.6
Peru	0	0.0
Portugal	5	13.8
Uruguay	0	0.0
Venezuela	0	0.0
CO-PRODUCTIONS (total)	4	11.1
Portuguese co-productions	1	2.7
Co- productions among Obitel countries	3	8.3
GRAND TOTAL	36	100%

Source: Obitel Portugal

As can be seen on Chart 7, five of the twelve Obitel countries had premiering productions on the Portuguese catalogues (41,7%) with Spain having the largest offering (19), followed by Brazil (3), Argentina and Mexico (2) and Colombia (1). The remaining countries - Chile, Ecuador, USA, Peru, Uruguay and Venezuela - had no premiering productions in Portugal, but Chile and the USA participated

in co-productions with the series *El Presidente* (a co-production with Argentina, Chile and the USA) and *Selena: la serie* (a co-production with Mexico and the USA).

4. Fiction and audience engagement in digital environments

Following the trend of previous years, audience engagement in digital environments could predominantly be seen on social media in the managed digital accounts for the main titles on air. Therefore, similarly to 2019, all the telenovelas and series for the different networks have either a Facebook or Instagram account where the production shares plot developments, backstage images and videos as well as open-ended questions attempting to engage audience interaction. Even though these accounts are admittedly “official” in nature, there are notable examples, continuing from last year, such as the case of SIC’s telenovela *Terra Brava*, in which the actress Sara Matos kept on producing content for Instagram as “Elsa Santino”, her character on the telenovela. Apart from the usual promotion of plot developments and audience interaction, the actress also presented clips from alternate points of view to shots that were aired on regular broadcast as well as her own personal reaction as Elsa Santino to certain dramatic developments. It was also under this guise that the character launched her official music clip on Youtube, as was portrayed in the plot.

Still, with the emergence of the pandemic in 2020 and the drastic social and cultural paradigm shift worldwide, the main audiovisual content providers in Portugal were forced to reconsider their ongoing and future offering in face of the challenges that this new reality posed. Therefore, considering the natural constraints to social distancing, the interdiction to cross over districts and the general lockdown orders, digital media immediately assumed a crucial role not only in providing on-demand content, but also as a way to present new types

of offering that are exclusively digital. The channel RTP Memória, previously geared towards airing classics and archive footage, was entirely restructured to run distance school classes complemented by a strong online component. Similarly, the Arts quickly embraced the digital landscape as an alternative to the closing of live performances. Therefore, apart from the creation of online theatres, as was the case of the National Theatre D. Maria II, RTP itself fast-tracked a project still in development - RTP Palco - in order to launch it as a response to the constraints caused by the pandemic. RTP Palco is an on-demand digital content offering geared towards culture and performative arts, such as tapings of dance shows, music events and theatre, among others. Even though this type of content is not of a strictly televised nature, it is worth noting that the platform itself is strikingly similar to any other VoD offering such as RTP Play or Netflix, and even goes as far as presenting original productions. Indeed, 2020 was marked precisely by the significant increase in offering of digital and on-demand content as a viable alternative in face of a lockdown context.

In face of this trend, and also due to the production constraints that led to actors, authors and production crew to be in quarantine, there was an added interest in digital fiction, as was the case of projects such as “Hashtag Quarentena” (@hashtagquarentena) e “Chamadas Para a Quarentena” (@chamadasparaaquarentena). Both of these relied on a series format that openly assumed the lockdown as a reality and actors - often playing themselves - would interact with each other on video conference. These episodes were made available on social media such as Facebook and Instagram and created their own audience organically through virality. In the case of “Chamadas Para a Quarentena”, the series concept was acquired by RTP and adapted for broadcast under the title *O Mundo Não Acaba Assim*. This is a rare case of transmediality from digital to FTA which demonstrates the power that this medium has obtained in response to the pandemic.

5. Highlights of the Year

During a year so deeply impacted by the consequences (in production and in consumption) of a worldwide pandemic, the FTA networks were compelled to update their strategy and open themselves to reflect and act on what was already in the foreseeable future: the inevitable paradigm shift regarding television consumption in face of a greater acceptance of new formats and content platforms. This was evidenced by the investment in a non-linear and decentralized offering. As Amanda Lotz (2018) had already stated:

“Rather than killing television, internet distribution markedly improved how we watch. Crucially, internet distribution has capabilities that broadcasting, cable, and satellite lack. Internet-distributed television allows audiences on-demand access. This capability is forcing a reinvention of television businesses that were built on scheduling programs. Changes in the business of television change what shows are made and what audiences can watch.”¹³ (p.5)

Therefore, the chosen highlight of the year were the local production strategies by streaming services and FTA stations that operate in national territory.

OPTO, the platform launched by SIC in late November, 2020, had the draw of offering exclusive titles to mark this new distribution strategy, as well as a comprehensive catalogue of thirty years of programming that is now available to watch. Among the new content, there is the series *A Gerala*, which had received support from the Instituto do Cinema e do Audiovisual (ICA), something which hadn't occurred

13 Obercom. Retrieved on April 17, 2021 https://obercom.pt/wp-content/uploads/2021/02/Covid_III_FINAL.pdf

in many years for a private network; a documentary by the comedian Bruno Nogueira, *Como é que o Bicho Mexe - O Natal de Maio*, comedy sketches by Ricardo Araújo Pereira, an autobiographical documentary by chef Ljubomir Stanisic; a drama series about night-life in Lisbon titled *O Clube* and *Esperança*, a series by the comedian César Mourão, who transitioned from the generalist channel to the streaming platform to try and blend drama and comedy under the same narrative.

SIC's streaming service has a premium plan with a price point of 9,99€ for international clients and 3,99€ for national clients, as well as a free version where, for the first time in Portugal, exclusively digital content is distributed. In the premium service, users have access to exclusive programmes and series, previews of telenovela episodes aired on SIC and "tailored" information with daily news of 10, 15 or 20 minutes.

As for the "paid" vs "free" subscriptions offered by national networks, there are three very distinct strategies in place: RTP Play operates according to a free model, partly due to being offered by a public service network and not being under the same commercial pressure than that of private networks, as a significant part of its budget comes from the so-called television tax (amount paid by taxpayers within the electric bill). Another reason for this model is the fact that it was born out of a repository/archive concept that naturally falls under the responsibility of a public service. TVI Player, on the other hand, operates under a mixed strategy by being free for national audiences and paid for international counterparts at 3,99€/month. OPTO follows a purely SVoD model in a clear emulation of Netflix's production strategy by requiring a fixed monthly subscription, but also an investment in exclusive productions for the platform.

Along with the enactment of the European Directive into national law, the launch of this platform was an important step in the Portuguese audiovisual strategy overall, as it contributed to create market

growth opportunities and livened the independent production sector by offering competitive Portuguese-speaking titles.

6. Theme of the year: Fiction in times of pandemic

In March, 2020, the Portuguese government declared a state of emergency, which caused a significant change in communication practices and the media consumption of the Portuguese people. According to a study by Obercom (July, 2020) titled “Pandemia e consumos mediáticos”¹⁴, there was an increased use of paid streaming platforms with 20,3% of interviewees stating to have subscribed a new information or entertainment service that they didn’t have before. This shows an acceleration of the ongoing process, one that is related with the change in consumption habits of the Portuguese viewers and follows a similar trend across the world.

The arrival of streaming platforms changed social practices, fragmented viewing, increased production costs and reformulated distribution circles. Platforms reinvented the way audiences watch television and generated a new concept - *binge watching* - consisting of consuming the content on offer from end to end in a compulsive fashion. This may have been heightened in the context of the pandemic, when the cultural and recreational offering was severely restricted. All of these changes happened in little over a decade, with a rapid acceleration during the last five years. There was a significant increase in the production of content from various geographies and, as new markets were conquered and the average viewing time increased, so did our ease of access through assorted screens.

In 2007, Netflix broke new ground in the media landscape by offering a paid streaming service and redefined its algorithm in order to show current trends and suggested content to its users. In 2011, this

14 Obercom. Retrieved on April 17, 2021 https://obercom.pt/wp-content/uploads/2021/02/Covid_III_FINAL.pdf

platform announced the start of original productions, something that would change the market and the way content is distributed. Currently, we are witnessing the gradual growth of assorted streaming platforms, including those with original productions as a way to set themselves apart from others and compete with Netflix itself. HBO, Amazon Prime Video and Disney+, the most relevant providers in the national market, have become strong contenders in an increasingly global landscape, with content largely produced in the United States, but with an increased importance of peripheral markets and an emphasis on series and films in Spanish. The entertainment industry increased to such a size that it has become very relevant for national economies. According to *The Economist*, \$650 billion were spent in programmes and acquisitions in the last five years, \$100 million of those just in the last year, a number which is only comparable to that of the oil industry.

Even though the pandemic has influenced the rise of streaming services subscriptions, there is a clear retention power in digital content, as 84,4% of interviewees stated that they will not suspend their subscriptions made during lockdown.

The national highlight on international platforms goes to the series *Glória*, which is the first Portuguese original project on Netflix. Directed by Tiago Guedes and original screenplay by Pedro Lopes, the Cold War thriller was produced by SPi, from the SP Televisão Group, and co-produced by RTP. This series takes place in the Portuguese village Glória do Ribatejo, where the American Communications Centre RARET broadcast Western propaganda to the Eastern Bloc during the Cold War. This is the perfect setting for a story of high-stakes espionage that can change the course of Portuguese and world history. Therefore, *Glória* is a project that aims to strengthen the strategic vision that several Portuguese production companies have of expanding across borders at a point in time that is equally important for the Portuguese audiovisual market, as the series sets the landmark for a new

cycle as it puts Portugal on the map of large international productions that Netflix is known to have.

Also for the first time, in 2020 Netflix and Instituto do Cinema e do Audiovisual (ICA) issued a call named “Escrita e Desenvolvimento de Argumento” for Portuguese authors and screenwriters. ICA stated that this partnership served as a way to drive Portuguese audiovisual production forward at a point in time where the sector was suffering heavily from the Covid-19 pandemic and the European Directive “Serviços de Comunicação Audiovisual a pedido”, which was passed by the end of 2018, had just been enacted into law. As stated above, according to this new law, streaming services such as Netflix are required to have at least 30% of European titles on their series and documentary roster.

Another important landmark this past year was the deal for a second season of the Iberian series *Auga Seca*, a co-production between Portocabo and SPi which will be available on HBO Portugal and Espanha Original. This police procedural was originally aired by RTP and TV Galicia and a second run in 2020 on HBO, thus integrating the first season on their content portfolio on both markets. The results were very positive among subscribers, which led to the direct investment in the series for a second season, this time with HBO having the first run.

Also in 2020, the video-on-demand platform Filmin, known for its vast catalogue of independent films incorporated 118 Portuguese titles. Filmin is originally a Spanish platform present in Portugal since 2016 and it has in its catalogue 125 short and feature films, both fiction and non-fiction. This is more than enough proof of the vitality and growth of the Portuguese audiovisual sector and its growing ability to find new distribution paths which - as we know from this year of pandemic - are as necessary as inevitable.

As counterpoint to this accelerated demand and offering of streaming content, the new challenges posed by the effects of the pandemic can be identified. Even though they are being overcome by the

audiovisual industry, they were particularly serious for production companies devoted to fiction. On March 2, 2020, the first case of Covid-19 was identified in Portugal and in less than two weeks later the production of series and telenovelas stopped, not because of a government mandate, as with other economic sectors, but because information on the means of transmission was still scarce, as were the prevention methods. Therefore, production companies themselves adopted preventive measurements in order to protect their own professionals. Between March and April, many companies turned to lay-offs and, in the following months, attempted to resume activity, especially projects that were abruptly interrupted and postponing the remaining projects that were in pre-production. Before the pandemic, the cultural and creative industries had had a constant growth since 2013, with the audiovisual sector growing between 0,3% and 3% annually and a turnover in 2019 of 119.000 billion Euro out of 643.000 billion Euro overall, due not only to the cinema production but mostly to the development of streaming platforms¹⁵. In the case of Portugal, the market was stable with a constant investment by FTA networks and streaming platforms making their first stakes in Originals. The pandemic increased costs in about 20% according preliminary data yet unpublished by APIT (Associação de Produtoras Independentes de Televisão), which falls in line with other European countries.

Despite this scenario, which gave momentum to the demand/offer of streaming platforms, television business has changed but not weakened (Lotz, 2018). In fact, according to researchers Joke Hermes and Annette Hill (2020):

15 Rebuilding Europe: the cultural and the creative economy before and after the Covid-19 Crisis. Retrieved on May 4, 2021 <https://www.rebuilding-europe.eu/>

Corona has re-consolidated television as master storyteller and as platform for cultural citizenship. Television could not have done this if the medium had not been domesticated as ‘family’ maker and teller of never-ending stories that offer ontological security and allow us to cope. In lockdown, even more than ordinarily, this provides the necessary link from the intimate to the public; transforming the domestic into a space for endless meetings, viewpoints, considerations as well as allegiances. Television undoes social distance. (p. 659).

References

- Hermes, J., Hill, A. (2020). Television's undoing social distancing. In *European Journal of Cultural Studies*. Vo 23(4). 655-661
- Lotz, A. (2018). *We now disrupt this broadcast: how cable transformed television and the internet revolutionized*. USA: MIT Press
- Anacom. Retrieved on April 10, 2021 https://www.anacom.pt/streaming/TVS2020.pdf?contentId=1603681&field=ATTACHED_FILE
- Diário da República Eletrónico-Lei 74/2020. Retrieved on April 18, 2021 <https://dre.pt/home/-/dre/148963298/details/maximized> Retrieved on April 18, 2021 from the Digital Economy and Society Index (DESI). Retrieved on April 18, 2021 <https://ec.europa.eu/digital-single-market/en/digital-economy-and-society-index-desi>
- The Economist, retrieved on April 10, 2021 <https://www.economist.com/weeklyedition/2019-11-16>
- Marktest Portugal. Retrieved on April 10, 2021 <https://www.marktest.com/wap/a/n/id~262d.aspx>
- Marktest. Retrieved on April 20, 2021 <https://www.marktest.com/wap/a/n/id~262d.aspx>
- Meios e Publicidade. Retrieved on April 29, 2021 <https://www.meiosepublicidade.pt/2021/01/audiencias-tv-2020-consumo-cresce-18-ano-pandemia-share-da-sic-sobe-tvi-rtp1-descem-face-2019/>
- Meios e Publicidade. Retrieved on April 10, 2021 <https://www.meiosepublicidade.pt/2021/01/audiencias-tv-2020-consumo-cresce-18-ano-pandemia-share-da-sic-sobe-tvi-rtp1-descem-face-2019/>

Meios e Publicidade. Retrieved on April 18, 2021 <https://www.meiosepublicidade.pt/2020/02/os-canais-programas-captam-investimento-soft-sponsoring-portugal/>

Obercom. https://obercom.pt/wp-content/uploads/2021/02/Covid_III_FINAL.pdf

European Audiovisual Observatory Retrieved on April 12, 2021 <https://rm.coe.int/trends-in-the-vod-market-in-eu28-final-version/1680a1511a>

Rebuilding Europe: the cultural and the creative economy before and after the Covid-19 Crisis. Retrieved on May 4, 2021 <https://www.rebuilding-europe.eu/>

Statista. Retrieved on April 10, 2021 <https://www.statista.com/outlook/dmo/digital-media/video-on-demand/video-streaming-svod/portugal>

